Delegating principal permission in ePotential

By default, only users with the status of principal in their edumail account can access the reporting functionality described in this document. However, you may like to give principal permission level access to another user at your school, such as the ICT Coordinator. Principal permission gives the user access to the school's data and allows the user to create survey recipient, data analysis and data comparison reports.

How to delegate principal permission


2. Click on the View Responses and Reports link in the My Survey box on the ePotential homepage.
3. Go to the **System Admin Tab**.

4. Select **User Maintenance**.

5. On the **User Selection** page find the user you want to give principal permission to by entering either the user’s TO/edumail number or their first or last name.

   ![User Selection](image)

   **User Selection**

   Search for users by specifying at least one of the following user details:

   - ID: contains: 12345678
   - First name: contains
   - Last name: contains

   Please note: All users can be searched for by their ID number. If a user has not logged in to ePotential before, you will not be able to search for them by first or last name.

   [Search]

   **Note:** If the user has not yet logged in to ePotential before, they will not come up in your search results.

6. Click on **Search**. A drop down list with all matching users will appear. If there is more than one user name, select the user you want to assign principal permission to by highlighting the required name on the list.

   ![Search Result](image)
7. The **User Maintenance** screen for that user will be displayed.

8. Make sure that the ID, First name and Last name are correct. This person’s current **User Level** will be displayed.

9. To delegate the principal permission to your school to this person click on **Add** in the **User Permission** section.

10. The **Add User Role** screen will allow you to select the role to assign.
11. Select Principal.
12. The Add User Role screen will then allow you to drill down to the school level.
13. Select your school’s Region from the drop down list.
14. Select your School from the drop down list.
15. Set when the Permission Expires by clicking on either never, a set date or in a number of days.

Note: When the permission expires the user’s access level will revert back to their status set in edumail. It is recommended that you only give user permission for one year due to staff changes.

16. Click on Add to save your changes.
17. The user will now have principal permission for their school. This permission will be displayed on the User Maintenance page.
18. To delete an existing permission, click Delete for that principal permission in the Permission box.